

Training for Office Supervision

I. INTRODUCTION

1. In our first report, "Training for Commerce and the Office", we emphasised that the effectiveness of the training the office worker receives will depend very much on his immediate supervisor.* We therefore recommended that companies should give particular attention to the training of supervisory staff in their instructional and training role. In this further report we approach the question of training for office supervision more broadly, with two main objectives:

- (i) to examine the steps which a company should take to improve the quality of office supervision by the establishment of a systematic and rational training policy; and
- (ii) to consider in what ways the industrial training boards can assist companies in this task.

2. We have called the report, "Training for Office Supervision" in preference to "Training for the Office Supervisor". This is because in many companies the person responsible for supervising the work of clerks and typists is not in fact known as the "Office Supervisor". In many small firms office supervision may be the responsibility of the office manager, the accountant, the company secretary or even the managing director; and there may be no supervisor grade between manager and clerk. On the other hand in the larger firms there may be two or even three degrees of supervision below managerial level; for example, group leader (or chief clerk), section supervisor and senior supervisor (or superintendent). Though our recommendations are aimed primarily at first-line supervision—at the "supervisor" who is in regular face-to-face contact with the clerks, machine operators, typists etc., whose work he oversees, directs and

* "Training for Commerce and the Office" (HMSO 7s. 6d.), paragraph 69.

inspects—we believe that what we say has equal relevance to higher levels of supervision.

3. The report focuses on the needs of those currently responsible for office supervision, whether they have been recently appointed or have some experience in the job. The reason for this is simple enough: probably only a small minority of those at present exercising supervisory responsibilities have had formal or systematic training for their jobs. Whilst it is desirable and important for companies to select and prepare promising young clerks for supervisory positions, we are in no doubt that the more urgent task is to improve the performance of those already in these positions. This will not be easy, for a number of reasons. In the first place the supervisor cannot easily be spared for extended training away from his job. Secondly, the needs are as various as the jobs: there is no standard training programme or general course which will give each man or woman the skills and knowledge he or she requires. The only effective approach is to plan the training to fit the individual. Thirdly, the person who is already in a supervisory position may feel—albeit wrongly—that the suggestion that he should be trained is a reflection on his performance as a supervisor. Managers concerned have therefore to “sell” the idea of being trained to people with perhaps little enthusiasm for it. These three considerations have strongly influenced the recommendations in this report. For example, we believe that the major emphasis must be on development on the job complemented by carefully selected, short, intensive courses directed to clearly defined objectives. We shall also emphasise the importance of the manager working out with his supervisors programmes which are seen to be relevant to their needs—programmes which develop naturally from *joint* discussion of the jobs and responsibilities of the supervisor. We are convinced that this is the only effective way of establishing training for office supervision.

4. Again and again our attention has been brought back to the problems of the smaller organisation or company. There are few businesses of any size which could justify running regular full-time formal training courses at supervisory levels and fewer still which could make such provision for office supervisors alone. But in the small company there are extra difficulties. There may be no personnel or training specialist to advise the management; and the managers themselves will often feel ill-equipped to give systematic training to the office supervisors under them. Again the small firm will not easily be able to release, say, its chief

clerk for courses lasting several weeks. The smaller the firm, the larger is the gap created by the absence of a senior or experienced member of staff.

5. It would be unrealistic not to recognise these difficulties, just as it would be defeatist to let them justify inaction. What we propose will make substantial demands on those firms—large or small—which have not thought it necessary or possible to develop office supervisors systematically. But we do not think our approach will put the smaller organisation at a particular disadvantage. Even the smallest firm can be expected to move in the direction which we suggest, given the support of the training boards' advisers or of other organisations we mention in Chapter V. No doubt to begin with, the boards will recognise genuine efforts to meet the standards we propose, even if the results leave something to be desired. The important thing is that firms should establish training schemes in the right way. If the general direction of their efforts is right—if the methods and objectives are sound—that is what really matters. What we have attempted is to give some simple and practical guidance, with suitable illustrations, on the most important methods and objectives of supervisory training in the office context.

6. We believe that a separate booklet for training in office supervision is justified. Despite the common content of supervision, there are a number of important differences between the job of the office supervisor and that of the shop floor supervisor. These will be reflected in his training. For example, the office is a communication and service centre, not concerned with producing goods for sale. Figures and words, written and spoken are the dominant features of the supervisor's job. This must affect the training required for office supervisors. Secondly, whilst the works foreman is often supported by a number of specialist service departments—time study, production planning, production control, inspection—the office supervisor will often be left to solve most 'production' problems, and to set appropriate targets, largely on his own.

7. It would, however, be wrong to exaggerate the differences between the two. The main principles to be followed by a company developing training programmes for works foremen are the same as those that ought to govern training for office supervision. Indeed there are dangers in regarding the office as something separate and radically different from the works. It is this kind of view which has at times permitted inefficiency in the office which management would not tolerate in the works.

8. In presenting this report, we must acknowledge our debt to the booklet on supervisory training,* written by J. P. de C. Meade and F. W. Greig of the Industrial Training Service, published in 1966 by the Central Training Council. Our recommendations owe a great deal to the analysis in that book; our own contribution consists largely in selecting those ideas which seem to us capable of being realised in the great majority of offices.

II. ESSENTIAL STEPS IN DEVELOPING TRAINING FOR OFFICE SUPERVISION

9. The first requirement is to identify the essential stages in the development by companies of training for existing office supervisors. These steps are:

- (a) to define the role and responsibilities of the supervisor and to set down what he has to know and do in terms of office supervision. This involves *JOB ANALYSIS* leading to a *JOB SPECIFICATION*;
- (b) in the light of the job specification, the responsible manager should identify points of strength and weakness in the supervisor's performance and decide in what directions further training and education are needed. This involves *APPRAISAL OF SUPERVISOR'S PERFORMANCE* and the preparation of a *TRAINING SPECIFICATION*;
- (c) the company must then decide how the various training needs can be met. This involves *DETERMINATION OF TRAINING METHODS* and *A PLANNED PROGRAMME*;
- (d) finally, it is essential to evaluate the training given, to see whether the supervisor's performance has reached the required standard. This involves *EVALUATION OF TRAINING*—which may lead to subsequent modification of action taken in stages (b) and (c) above.

10. The suggestions in this report are intended to assist management in formulating rational training policies covering these essential stages.

* Supervisory Training – A New Approach for Management (HMSO 4/-).

III. JOB ANALYSIS AND JOB SPECIFICATION

Job Analysis

11. The first task in establishing a soundly based training scheme for office supervision is to determine, in as precise and detailed a way as possible, what it is that the supervisor's job entails. Whilst in practice it may be found that there are a number of elements common to all office supervisors, or to many of them, it is not enough simply to work out a general training programme and apply it without examination of the individual supervisor's needs. The company should start with an analysis of each supervisor's job.

12. The purpose of job analysis is to show clearly what he does and the responsibility he bears in terms of supervision; and thereby to enable the company and the manager concerned to establish what knowledge and skills the supervisor requires. The process of job analysis should also provide the occasion for manager and supervisor to discuss together any special problems found in the job. Such discussion may help to resolve differences that appear between the manager's and the supervisor's views of the job and its major functions. It may also bring to light the need for changes in organisation and increased delegation of work. Finally, the results of job analysis may indicate the qualities required in future supervisors and therefore assist in their selection. Thus the task of analysing the supervisor's job involves essentially:

- (a) examination of the job;
- (b) discussion of results of (a) by manager and supervisor; and
- (c) preparation of an agreed job specification.

Job Specification

13. There are several ways of conducting a satisfactory job analysis; and as many ways of setting down the appropriate job specification. Some firms get supervisors to keep a diary in which they record what they do at given times of each day; and others may adopt some form of "activity sampling" (that is, observations at intervals of the supervisor's activities). One firm we know of asked its office supervisors to write a paper on "the purpose of my job" and used these essays as the basis for detailed discussion with the managers concerned and for the job specifications eventually agreed upon. The job specification must of course describe the requirements of the job rather than the

experience and qualities of the man who happens to hold it at any particular time.

14. We should not ourselves wish to recommend any one method exclusively. There are even advantages in using several different measures to confirm each other or to reveal differences which require clarification. The only stipulation we would make is that job analysis must involve both the supervisor himself and his manager. The job specification that emerges from the job analysis should be agreed upon in the light of discussions between the manager and the supervisor. A dialogue of this kind is an invaluable training exercise in its own right as well as being essential to the definition of the job and the determination of the training needs of the supervisor concerned.

15. We do not suggest that the job analysis should be exhaustive and include every small detail of the supervisor's activity. This could lead to over-emphasis of unimportant detail. It would also make the whole procedure look too formidable. We would stress that the best results are achieved from a simple agreement between manager and supervisor on the main aspects of the supervisor's work. We are aware that most supervisors do desk work as well as supervise the work of others. Any job analysis should separate these two aspects. It is a common fault for supervisors to act too much as senior clerks and to fail to delegate desk work to their subordinates. In training supervisors, the main objective is not to make them better clerks, but better supervisors able through their efforts to raise the productivity of others. The job specification should, therefore, show in some way how the supervisor is expected to apportion his time. If the results of job analysis suggest that there is not enough time available for supervising duties, then manager and supervisor should consider together what tasks can be delegated to subordinates.

16. We therefore recommend that the responsible manager should draw up a specification of the supervisor's job, and that the specification should be agreed by both the supervisor and manager. An example of a job specification of a supervisor's job in one company is at Appendix A. This specification sets out the responsibility of the supervisor under such headings as recruitment of staff, induction and training, organisation of work, inspection of work, discipline etc. It may provide a useful guide to the items that need to be considered in examining most office supervisor jobs. We emphasise that it is merely an example. Different jobs will lend themselves to analysis under different headings.

IV. APPRAISAL OF SUPERVISOR'S PERFORMANCE AND TRAINING NEEDS

Assessment of Performance

17. The main purpose of job analysis is to determine what the supervisor's job entails: the next step is to assess how well the supervisor does the job and what help he needs to improve. Though these two stages are really distinct, in practice they will often merge into one since the manager's discussions with office supervisors will tend to cover the content of the job and performance in it, and the difficulties the supervisor encounters. However this may be it is essential that

- (1) each supervisor's performance is *regularly* and *objectively* assessed ; and
- (2) these assessments are used to help the company decide
 - (a) what training the supervisor *requires* and (b) how *effective* previous training has been.

Standards of Assessment

18. Good standards of assessment and comparison are essential to test whether training that has been given has been appropriate and to ensure that future training is geared to the needs of the individual and the firm. Appraisal of the supervisor's performance should, as far as possible, be based on answers to questions framed in the light of job analysis. Most firms will, for convenience and for comparison of the performance of different supervisors, carry out the appraisal on a report form or rating sheet which can be used for all office supervisors. Where this is done, great care must be taken to ensure that the form avoids generalised descriptions of character in favour of *precise and relevant measures of performance*. The appraisal should preferably require the reporting manager to distinguish those weaknesses in the supervisor's performance which training—or further training—could remedy ; and to make any recommendation in this regard. In all but the smallest firms the forms ought to be signed both by the supervisor's reporting manager and by the senior manager who has overall responsibility for office training. This procedure will help to ensure a degree of objectivity in assessing the supervisor's effectiveness and will enable the responsible senior manager to keep a check on this important aspect of training in the firm. If the training manager sees reports he

may well be able to advise on suitable training courses which the reporting manager cannot always be expected to know about.

19. We include at Appendix B an example of the kind of appraisal or report form we believe to be satisfactory. The particular appraisal form which is used should relate directly to the job concerned and should bring out clearly the aspects of the person's performance where further training would be appropriate.

V. TRAINING PROGRAMMES

Training Requirements

20. Job analysis and performance appraisal will indicate the knowledge and skills the supervisor requires to carry out his responsibilities more effectively. The analysis cannot easily be confined to the supervisory aspect of the job alone and, if done thoroughly, will include the full range of responsibilities some of which may be of a professional or technical nature. Many supervisors have professional or technical responsibilities in addition to those of supervision and the training needs which become apparent from job analysis and appraisal will cover both aspects of the job. The recommendations which follow are however confined to the supervisory aspect as professional and technical training is outside the scope of this report. The training programme must then be planned in the light of these requirements revealed by the job analysis and performance appraisal, though it may often be desirable to extend the programme to cover other subjects likely to be important in the supervisor's subsequent career.

21. The following might be included in the training given to the majority of office supervisors, though this list is not exhaustive and the emphasis will vary from situation to situation :

- (1) the firm's objectives, products, policies and methods ;
- (2) the firm's organisation and functions of the various departments ;
- (3) the firm's personnel policy ;
- (4) the work for which the supervisor is responsible ;
- (5) the methods of output planning and control ;
- (6) inspection and quality control ;

- (7) work simplification ;
- (8) clerical work measurement ;
- (9) the use of machines and equipment ;
- (10) instructional methods ;
- (11) safety and fire precautions and hazards to health ;
- (12) legal aspects of office supervision e.g. knowledge of Contracts of Employment Act, Offices Shops and Railway Premises Act ;
- (13) leadership and handling staff problems ;
- (14) job grading and salary structure ;
- (15) report writing and letter writing ;
- (16) oral communication.

Implementation

22. Having determined the most important elements in the training programme, the manager has to decide how the programme can best be implemented. The questions he will have to answer include:

- (1) What is to be the balance between
 - (a) formal internal or external courses ; and
 - (b) development on the job under the manager's guidance?
- (2) are there available courses which are suitable?
- (3) what measures are needed to ensure that development on the job is satisfactory?

23. The answers given will depend very much on the resources of the firm and the subject matter to be covered. Clearly, however, an important part of any training programme will not only be specific to the firm but must be job-based. External courses if carefully selected as meeting the needs of the individual, can be an invaluable supplement to the supervisor's development ; they cannot satisfactorily replace in-firm training and development. This being so, we *recommend* that, as a general rule, firms making use of external courses should also have a policy of internal training supervised by a senior manager and carried out according to a considered programme. It would be undesirable, even if it were possible, to lay down how such

programmes should be constructed. In many cases, the number of office supervisors will be small, and it will not be practicable to establish special internal courses. Much will depend on tutorials and discussions on particular subjects or problems with the supervisor's immediate superior. These may be supplemented by short periods of secondment to other departments or offices; or by giving the supervisor a project to carry out (e.g. the reorganisation of an office filing system or the examination of the commercial advantages of installing a more expensive copying machine); or by periodic seminars or meetings with other supervisors and managers. An example of a course operating in a large company is given at Appendix C, for information. We also give, for information, details of the Ministry of Labour T.W.I. Course for Office Supervisors at Appendix D.

The Role of the Supervisor's Manager

24. One fundamental principle may, however, be asserted: the attitude of the supervisor's manager, and his commitment to the task of developing the supervisor, is the most important factor in successful training. The main purpose of the planned programme ought to be to ensure that the manager takes his training responsibilities seriously; and that as a result the supervisor sees the training not as an imposition but as an opportunity. This is why we have emphasised the importance of the manager's involvement in job analysis and performance appraisal.

Use of External Courses

25. Examination of the supervisor's training needs—particularly in the smaller firms—will often show that some of them can best be met through external courses. Such courses can provide instruction by experts in "tool" subjects e.g. instructional methods, clerical work measurement, work simplification; or they can give the supervisor an insight into the sociology of the working group and into human relations in the work situation. External courses may also be used to give supervisors a broader background knowledge of business and commercial life. They must, however, be carefully chosen to meet a clearly defined need; and many firms have not sufficient experience to know which courses will best satisfy their needs. Before committing themselves to using a particular course firms should, if they are in any doubt, seek expert advice on its suitability (for example, from their training board, the Ministry of Labour's

Industrial Relations Officers or the nearest college of further education ; or from such organisations as the Institute of Office Management, the British Institute of Management, the Institute of Supervisory Management, or from a training consultant). For convenience, we have noted in Appendix E a number of organisations which have considerable experience in training for office supervision. This list also mentions some of the different kinds of course currently available. Colleges will be prepared to consider providing courses in office supervision if they are approached.

Co-operation with Colleges

26. We hope that more colleges will take steps to establish certificate and other courses specifically for office supervisors ; and that both firms and training boards will work closely with these colleges in co-ordinating both the college and the company parts of the course so that what is achieved is a unified or integrated approach to supervisory training. Such an approach is the key to the success of supervisory training.

VI. CONCLUSIONS AND RECOMMENDATIONS

Recommendations relating to Grants

27. We have described in this report several features which we consider to be essential to any training scheme for office supervision. We *recommend* that the Industrial Training Boards should make it a condition of grant to firms in respect of the training of office supervisors that the training provided covers the following features:—

- (1) that the responsible manager has drawn up a specification of the supervisor's job derived from a job analysis, and that this specification has been agreed by both the supervisor and manager (Chapter III)
- (2) that there should be evidence of a system of regular appraisal of training needs in the light of performance (Chapter IV)
- (3) that, as a general rule, firms claiming grant for external courses should have a policy of internal training super-

vised by a senior manager and carried out according to a considered programme (Chapter V), and

- (4) that firms are able to produce adequate records to show that their approach to the training of office supervisors follows broadly the path we have outlined.

Small Firms

28. We recognise, however, that in the case of small firms which employ an office supervisor some appropriate simplification of these conditions for grant should be allowed.

Assistance to Firms in carrying out Analysis and Appraisal

29. We also recognise that many firms would be ill equipped at present to work out training programmes in the way we have suggested; and that many, if not most, companies will need assistance in carrying out systematic and thorough analysis of supervisory jobs and appraisal of training requirements. We would therefore urge boards to consider providing or supporting the provision of seminars to which firms may send senior managers for intensive instruction in the kind of approach we have recommended. The aim should be to ensure that there is at least one manager in a firm capable of developing sound training schemes for office supervision. We emphasise again the importance of the manager's personal contribution to the training of the office supervisor.

Job Specification

[*Note:* This is an example only. The headings of a job specification will vary to fit the particular job.]

FIRM:

Title of Post: Payroll Supervisor

Name of Supervisor:

Date of Review:

Purpose

1. To ensure that the payroll for works employees and weekly paid staff is prepared
 - (a) by Thursday of each week;
 - (b) in accordance with agreements on wages and associated matters, and with authorised deductions.
2. To ensure that pay packets are made up for payment and are paid out each Friday.
3. To ensure the security of wages cash during transit, at make up and at pay points.
4. To account for authorised deductions from pay.*
5. To supervise the section.

* This statement would need to be expanded, in accordance with the facts, to deal with stamping of insurance cards, PAYE, payments into pension funds, and remittances to other bodies for whom deductions were made.

Primary Work

Planning

1. (a) Review methods of collecting information necessary for wages calculations.
- (b) Review systems and procedures within the section.
- (c) Plan the flow of work necessary to prepare the payroll.

Executing

1. (a) Make minor changes or recommend major changes in methods to accountant.
- (b) Make minor changes or recommend major changes in systems to accountant.
- (c) Allocate work and instruct members of the section as necessary.

- | | |
|--|--|
| | <ul style="list-style-type: none"> (d) Check that all relevant documents are received on schedule and clear delays. (e) Personally carry out percentage check on one section of the payroll each week. |
| 2. (a) Review procedures for making up and paying out pay packets. | 2. (a) Recommend all changes in procedure to accountant. |
| (b) Plan the flow of work necessary for make up and payout. | (b) Allocate work of making up pay packets. |
| | (c) Arrange for transfer of packets to paying points. |
| | (d) Arrange for issue of pay packets at agreed points and times. |
| | (e) Account for deductions (see note above). |
| (f) Keep under review special procedures for dealing with requests and complaints. | (f) Agree requests for payment of wages to wife/husband where worker is unable to collect personally. |
| | (g) Agree or reject requests for advances or wages. |
| | (h) Arrange for all queries relating to payment to be dealt with and handle difficult cases personally. |
| | (i) Personally check two pay points each Friday to ensure that the correct procedures are being carried out. |
| 3. Systematically review the procedures for security of wages cash and packets. | 3. (a) Make recommendations for change to accountant. |
| | (b) Check that procedures are being properly implemented. |
| 4. Keep under review the complement and work load of the section. | 4. (a) Make recommendations to accountant on permanent changes in complement of staff. |
| | (b) Arrange for <ul style="list-style-type: none"> (i) Overtime (ii) Temporary loans of additional staff to meet variations in the day-to-day work load of the section. |

Secondary Work

1. Arrange for the maintenance of adequate records for costing and other purposes.
2. Check and maintain standards of work of staff and section.
3. Maintain discipline within the section and ensure compliance by the staff with the company's conditions of service.
4. Interview and select new staff for the section (in conjunction with the Personnel Department).
5. Participate, with the Personnel Department, in the induction of new staff.
6. Arrange all training on the job within the section, supervise the progress of trainees and recommend staff for formal training/education necessary for their development (in consultation with the Personnel Department).

Staff Complement

14 clerical staff (female).

Relationships

1. Has direct and delegated authority (as defined above) from the accountant, to whom he reports.
2. Has direct authority over his supporting staff with no powers of delegation.
3. Is required to
 - (a) Consult with the Personnel Department on staffing and training matters.
 - (b) Consult with cashier on matters affecting cash.
 - (c) Advise Costing Section as required.
 - (d) Consult with Time Office and Production Departments on supply of basic information.
4. Must maintain outside contacts on wages matters, particularly with the Bank, H.M. Inspector of Taxes, Ministry of Social Security, and supply such information as may be required.

APPENDIX B

Training Appraisal Form for Office Supervisors

[*Note:* Questions 1 to 15 relate to the work of the supervisor (as defined in the job specification) over the previous twelve months and are designed to ascertain what training may be needed. Firms may wish to include these questions in a general appraisal form going beyond training. The questions can be answered "YES" or "NO" and provision is made for comments. If the answer is "NO" the appraiser must detail the evidence for saying "NO" and the reasons (which may have to be discussed with the supervisor). The detail of the answer will illustrate whether training is required:

e.g. If the answer to question 1 reveals that work is not always produced on time the reason may be:—

- (a) the supervisor has insufficient staff
- or (b) there is a consistent delay in receiving information from another department
- or (c) the supervisor does not organise the work properly
- or (d) one of the staff is slow and unreliable

In the case of (a) or (b) the remedy is one of organisation; if (c) or (d) applies there is an indication that training is necessary.]

Name of supervisor:

Age:

Position held and date of appointment:

Brief outline of responsibilities:

Number of staff (details below):

	NAME	MALE OR FEMALE	AGE	DUTIES
(a)				
(b)				
(c)				
(d)				
(e)				

1. Is the work of the office consistently produced on time?

YES/NO

COMMENTS

2. Is the work of the office consistently accurate and reliable?

YES/NO

COMMENTS

3. Is the output of work from the office satisfactory?

YES/NO

COMMENTS

4. Is the quality of work from the office satisfactory?

YES/NO

COMMENTS

5. Does the supervisor have a defined programme for training his staff?

YES/NO

COMMENTS

6. Are all his staff fully trained or under training?

YES/NO

COMMENTS

7. Has the supervisor suggested ways in which the output of his office could be improved or the work be simplified?

YES/NO

COMMENTS

8. Has he coped satisfactorily with new tasks and changes in routine?

YES/NO

COMMENTS

9. Has he given any evidence of cost consciousness?

YES/NO

COMMENTS

10. Is he knowledgeable about the uses of office machinery?

YES/NO

COMMENTS

11. Does he use office machinery to the full?

YES/NO

COMMENTS

12. Is his written work satisfactory?

YES/NO

COMMENTS

13. Does he express himself clearly and adequately?

YES/NO

COMMENTS

14. Does he show a good appreciation of the firm's objectives, policies and products?

YES/NO

COMMENTS

15. Does he co-operate satisfactorily with other sections and departments?

YES/NO

COMMENTS

16. Is his control of staff satisfactory in all respects: e.g. recruitment, appraisal, discipline?

YES/NO

COMMENTS

SUMMARY

What further training or development would make him a more effective supervisor?

SIGNED

POSITION

COUNTERSIGNED

DATE

DATE

Example of a Course operating in a large company

Section Supervisor's Course

The course is in two phases:

1. Four days' concentrated study in the Training Centre, giving an introduction to the characteristic demands of any section.
2. Detailed studies on one afternoon each week for the following twelve weeks. For the first three of these the group will re-assemble in the Training Centre to study a case problem; the following nine will be concerned with assignments on the section itself.

SYLLABUS

1. *Introduction and Outline of the Course*

Purpose: To put the course into perspective.

Scope: The training policy; clerical trainees; office development course; group leader training; supervisor's course; the needs of the supervisor; the course and the job; complementary training.

2. *The Nature and Area of a Supervisor's Job*

Purpose: To create an awareness and acceptance of the duties and responsibilities inherent in the supervisor's job and to emphasise those skills which can be developed by training.

Scope: Defining the supervisor; the importance of purpose and achievement; the means; the clerks; leadership. Other relationships: managers, departments serviced, customers and suppliers. Relating the course to responsibilities.

3. *The Productive Office*

Purpose: To define the office in relation to the business.

Scope: The traditional office function; the productive office concept; group office organisation; the need for co-ordination and control; the role of the specialist.

4. *Studying the Section*

Purpose: To stress the need for, and to provide a pattern for the supervisor to make a detailed examination of his section and of his duties and responsibilities in relation to it.

Scope: Aspects of the supervisory job; creating a balance; knowing what is done and why; how to study a section; the use of study sheets; "The Purpose of My Job".

5. *The Supervisor and the Personnel Policy*

Purpose: To acquaint the supervisor with the implication of the personnel policy and his role in its application.

Scope: The elements of good personnel policy; conditions of work; rates of pay; training and promotion; sickness and welfare; security; importance of the individual.

6. *Planning the Work Flow*

Purpose: To assist the supervisor in planning the work of the section and achieve economy of effort.

Scope: Planning the work of the groups; inter-relating the groups; allocating work; routine tasks; special tasks.

7. *Machines, Equipment and Stationery*

Purpose: To give the supervisor an opportunity of appraising the machines and equipment on his section for efficiency and utilisation.

Scope: Review of developments in this field followed by a discussion on the particular needs of the group. Demonstrations of utilisation and short cut methods.

8. *Delegating and Inspecting*

Purpose: To impress upon the supervisor the need to make best use of his supervisory skills and to develop his subordinates by wise delegation.

Scope: Principles of delegation; the need for control; the problem of inspection; use of check lists.

9. *The Supervisor and his Training Responsibilities*

Purpose: To assist the supervisor in the training and development of his staff by reviewing the facilities available and his responsibilities in relation to them.

Scope: Junior Training: induction; machines; shorthand and typewriting; job instruction; office development; group leaders; the role of the mentor; external training.

10. *Control Procedures*

Purpose: To assist the supervisor in adhering to schedules by giving guidance in the techniques of work control.

Scope: Examples of types of control in common use; relating the method to the need; discussion of problems.

11. *Reporting*

Purpose: To improve the supervisor's ability in the effective communication of information.

Scope: The need for and the means of initiating source information and the effective reporting on it.

12. *Handling Personnel Problems*

Purpose: To develop the supervisor's skill in maintaining good relationships on his section.

Scope: Defining a problem; knowing the individual; how to handle a problem; acting within authority.

13. *Cost Control*

Purpose: To assist the supervisor in his responsibility for costs.

Scope: Unit costs; sectional costs; sectional budgeting.

14. *Planning One's Job*

Purpose: To assist the supervisor in using his skill and time to the best advantage.

Scope: Effective use of skill and time; the need to plan ahead; different types of planning; setting priorities.

APPENDIX D

Ministry of Labour

TWI Course for Office Supervisors

This course has been developed in consultation with, and at the request of, interested firms to train supervisors in three important aspects of their work. Since the term "supervisor" in this instance is intended to cover all those who are in charge of staff or who exercise authority either directly or through subordinates these three aspects are:

(a) Leadership

Ability to create and maintain good staff relations and to handle staff relations problems. Skill in interviewing and in conducting staff meetings. (11 hours)

(b) Imparting knowledge

Ability to train staff "on-the-job" in routine clerical operations. A knowledge of how to assess training needs within a section and to plan to meet them. (10 hours)

(c) Improving output

An ability to make increasingly better use of the resources available to the section and a knowledge of how Method Study is used to improve office methods. (9 hours)

The course may be presented to groups of from nine to twelve supervisors at a time during a period of one full week or in ten three-hour sessions spread over a period of some two weeks. The training is conducted on firms' premises by a TWI Trainer who is normally a member of the firm and who has been specially trained by the Ministry. Where no firm's trainer is in post, the course can be conducted by a Ministry of Labour Training Officer, by arrangement.

CONTENT OF THE COURSE

Introduction

A senior member of management opens the course and then hands over to the Trainer.

Examination of an office section (Exercise No. 1)

A case-study of a section is considered by the supervisors working in syndicates. Spokesmen report their syndicates' assessment of the section's capacity to meet its overall task, the interchangeability of staff on the jobs done in the section, the state of human relations and the efficiency of the work methods within the section.

Supervision—what adds to its complexities?

A discussion in which the supervisors consider what is expected of them by their management and by their staff.

On the one hand the management expects a supervisor to run his section efficiently, to plan, direct, control, maintain quality, promote discipline

and so on. On the other hand the staff look to him, as the representative of the employer, for human treatment, security, worthwhile work, outlet for initiative, advancement, etc. Bridging the gulf between the two calls for leadership on the part of the supervisor.

Some foundations on which to build good staff relations

A discussion of three situations causes the supervisors to consider the importance of treating people as individuals, of preparing people to accept change, of recognising outstanding ability and of helping people to use their ability to the full.

Some hints on handling staff relations problems

Discussion of a case-example accents the importance of getting the facts, weighing them, determining a sound objective, determining the action to be taken, taking it and checking its results.

The Sales Office situation

A case-study revealing three staff relations problems in a section. One is used by the Trainer to coach supervisors in using the hints on handling staff relations problems. The others provide the supervisors with further practice in using these hints.

An introduction to interviewing

A discussion on the factors that affect the success of an interview and consideration of some hints on interviewing.

Practice interviews

These provide the supervisors with an opportunity to test the actions that they worked out in connection with the staff relations problems portrayed in Exercise No. 1 and in the Sales Office situation.

Conducting Staff Meetings

Two staff meetings concerning the Sales Office situation are conducted by the supervisors, these extend the practice in interviewing inasmuch as six of them are involved in each exercise.

Assessing the need for training in a section

An exercise to give practice in planning the training required to achieve more interchangeability of staff on the jobs done in the section. The importance of training to a plan is discussed in relation to the supervisors' own sections.

The supervisor's part in communication and training

A discussion of the vital need for effective communication between the supervisor and his senior, with colleagues on matters of mutual concern, with specialists and with staff in his own section.

Commonly-used methods of instruction

The trainer demonstrates the shortcomings of commonly-used methods of instruction in order to promote a discussion on how to transmit knowledge to a learner with greatest effect.

Teaching at the desk

A demonstration is given by the Trainer portraying good instruction in a routine clerical operation. A discussion follows on the teaching methods used by the Trainer. A leaflet "Teaching at the Desk" is issued and it is seen that he used the advice contained therein and that his teaching had been helped by his use of a Job Analysis. The Job Analysis is fully considered and seen to be a document which facilitates the planning and the success of instruction.

Exercises in instructing

Six of the supervisors are invited to give demonstrations of instructing using jobs that they have chosen from their own sections. After being coached by the Trainer in the preparation of their instruction (Job Analysis) they then demonstrate before the group. Each demonstration is discussed as to its merits and demerits. These demonstrations and discussions increase the supervisors' skill in instructing.

Method Study in the Office—Introductory

A leaflet entitled "Method Study in the Office" is issued and discussed by the Trainer. He then demonstrates how six basic steps, namely, Select, Record, Examine, Develop, Install and Maintain were used by an Accountant to improve a method of issuing National Savings Certificates to employees in his firm. This is followed by a short demonstration of the principles of motion economy as applied to repetitive work done at a desk or a counter.

Method Study in the Office—First exercise

The supervisors, working in syndicates, study methods of sorting and distributing mail in an organisation. This provides practice in the use of the six basic steps and the principles of motion economy.

The critical analysis of forms and related paper work

A short demonstration given by the Trainer shows the supervisors that the work content of a procedure is often governed by the layout and content of forms and paper work involved. A technique of critical analysis is demonstrated and its potential effect on the reduction of paper work discussed.

Method Study in the Office—Second exercise

Four of the supervisors choose jobs from their sections to provide four syndicate exercises in the application of Method Study to office work. These exercises usually result in an improvement on the original method and the supervisors are coached in the submission of suggestions for improved methods to management for approval.

Final Exercises and close of Course

A paper is issued and studied by the supervisors, working in pairs, which poses problems of staff relations, work method and "on-the-job" training. A limited time is allowed for consideration and the supervisors then report on the action that they would take on these problems. The Trainer summarises their reports and, in closing the Course, demonstrates how the training given helped members to reach very sound decisions in a relatively short time. Finally he makes the point that similar use of

time to consider problems will surely bring good results in the supervisors' own sections.

Further information about this Course and its availability may be obtained from any local or Regional Office of the Ministry or from:

Ministry of Labour (TE 4)
Ebury Bridge House
Ebury Bridge Road
LONDON, S.W.1

List of Organisations providing courses on Office Supervision

[Note: This is a representative but not a comprehensive list. Readers who require further information should write to the organisations listed below.]

The Institute of Office Management
167 Victoria Street
LONDON, S.W.1

Courses leading to the Institute's Certificate in Office Supervision are held at a large number of colleges of further education throughout the country. The syllabus is in two parts. Part A: "The Theory and Practice of Supervision" acquaints students with the scope of an office supervisor's responsibilities and with the various techniques which may be employed in fulfilling them. Part B: "Clerical Operations and Procedures" enables students to survey the field of clerical work as a whole.

In September, 1968, a new expanded syllabus will be introduced which is designed to conform with the recommendations of this booklet. There will be four subjects: Office Machines and Methods, Communication and Training, Supervisory Control Techniques and Human Aspects of Supervision.

The Institute arranges week-end residential courses for office supervisors held from a Thursday evening to Sunday after lunch. The syllabus includes Human Relations, Supervisors' Role in Relation to Management, the Newly Appointed Supervisor, Training and Work Simplification.

One-day conferences for specialist supervisors are held:

Punched Card Supervisors, Typing Supervisors, Machine Dictation Supervisors, Telephone Supervisors, Filing Supervisors. These include talks on human and work problems.

The Industrial Society (Commercial Division)
Robert Hyde House
48 Bryanston Square
LONDON, W.1

The Commercial Division of the Society provides a variety of courses concerned with achieving maximum performance from staff for office supervisors from all sections of industry, commerce and public authorities:

Two-day courses for office supervisors, "Successful Management in the Office", are held in London most months and on about twenty

occasions each year at the main provincial centres. Subjects covered include supervisory responsibilities, staff relations problems, delegation and decision making, communication, interviewing, training and similar practical techniques.

Two-day courses, "Basic Supervision for Women", are held regularly in London and occasionally in the provinces. These are particularly suitable for women supervisors who have been recently appointed or who have not received other formal training in supervision.

Five-day courses, "Tutorial for Women Supervisors", are held regularly in London to provide supervisory training in greater depth on an individual basis.

There is a continuous programme of one-day conferences to deal with single topics in greater depth. These cover such subjects as training of clerical workers, office staff turnover, office environment, employment of part-time staff and the like.

In addition, courses in office supervision can be designed to meet the specific needs of individual organisations, and conducted on their own premises or at residential centres by the Society's training staff.

The Institute of Supervisory Management
King Edward House
New Street
BIRMINGHAM 2

Local branches of the Institute are active in almost all the industrial centres of the United Kingdom. They arrange lectures, works and other visits, discussions, study groups, film nights, special courses, conferences and social activities. The aim is to provide a medium for self-development through which supervisors can gain further knowledge, make useful contacts, keep up to date on current trends and gather information of practical value in their jobs.

Week-end residential courses have been a feature of the Institute's national activities since 1949. In addition, the Institute organises one-day courses and seminars. The residential courses are divided into four categories:

- | | |
|------------------------------------|---------------------------|
| (i) First Series | } Courses for Supervisors |
| (ii) Advanced | |
| (iii) Special | |
| (iv) Courses for Training Officers | |

and the non-residential into three categories:

- | | |
|-----------------------------|---------------------------|
| (i) First Series | } Courses for Supervisors |
| (ii) Advanced | |
| (iii) Seminars for Managers | |

The variety of subjects covered makes it possible for an external course to be appropriately integrated into the company's own training scheme.

Courses at Colleges of Further Education

Many colleges provide formal courses leading to the Institute of Office Management's Certificate in Office Supervision (see above).

They may also arrange courses suitable for office supervisors leading to the Certificate in Supervisory Studies issued by the National Examinations Board in Supervisory Studies. The syllabus is, by arrangement, the same as that for the Institute of Office Management's new certificate, but in addition to passing a written examination candidates will be required to attend a short residential course and undertake a project.

Some local, area and regional colleges have a regular programme of short intensive courses for office supervisors. Colleges are prepared to consider providing specific courses if they are approached.

British Association for Commercial and Industrial Education
16 Park Crescent
Regent's Park
LONDON, W.1

BACIE provide a course primarily designed for training officers whose duties comprise or include the training of office supervisors and staff. The course, "Training for the Office", is available both on a residential and non-residential basis and lasts from Monday to Friday.

Publications

Previous Publications by the Central Training Council in this series include:

Training of Training Officers. Introductory Courses
(Published May 1966. HMSO 1s. 6d.)

Supervisory Training. A New Approach for Management
(Published June 1966. HMSO 4s.)

Training for Commerce and the Office
(Published September 1966. HMSO 7s. 6d.)

An Approach to the Training and Development of Managers
(Published October 1967. HMSO 1s. 6d.)

Training of Training Officers. A Pattern for the Future
(Published November 1967. HMSO 3s. 9d.)

Central Training Council Reports to the Minister of Labour:

First Report (H.C. 352. November 1965) HMSO 1s. 6d.

Second Report (H.C. 486. June 1967) HMSO 3s.

Central Training Council Memoranda have been issued on the following subjects:

No. 1 Industrial Training and Further Education (April 1965)

No. 2 Industrial Training and Training in Safety (September 1965)

No. 3 The Use of Programmed Instruction in Industrial Training
(February 1966)

No. 4 Industrial Training and Further Education. A Further Statement by the Central Training Council (March 1966)

No. 5 Approach to Industrial Training. An Assessment of the Main Tasks facing Industrial Training Boards (April 1966)

No. 6 The Selection and Training of Instructors (May 1966)

Copies of these memoranda are obtainable free on application to the Ministry of Labour, 162-168 Regent Street, London, W.1.

Ministry of Labour Training Publications approved by the Central Training Council:

Glossary of Training Terms
(Published December 1967. HMSO 4s. 9d.)

Industrial Training Research Register
(Published December 1967. HMSO 11s.)

Printed in England by Her Majesty's Stationery Office
at St. Stephen's Parliamentary Press

TRAINING FOR OFFICE SUPERVISION

A Report by the
Commercial and Clerical Training Committee
of the Central Training Council

LONDON
HER MAJESTY'S STATIONERY OFFICE
1968

The Central Training Council has endorsed the Report made by its Commercial and Clerical Training Committee.

The Council proposes to Industrial Training Boards that they should take the recommendations contained in the Report into account when framing their own recommendations under Section 2(1)(c) of the Industrial Training Act, 1964.

Central Training Council
Commercial and Clerical Training Committee

September, 1967

Dear Sir John,

I have pleasure in submitting to you, for consideration by the Council, the second report of the Commercial and Clerical Training Committee.

In our first report "Training for Commerce and the Office" we considered the training of young people in offices. Throughout that report stress was laid on the important part played by the office supervisor and the need to ensure that the supervisor was properly trained.

The Committee felt that there was a clear need for a separate publication on training for office supervision, additional to the Industrial Training Service's booklet "Supervisory Training: A New Approach for Management". Although we readily acknowledge our debt to that booklet, it was written with the shop floor foreman mainly in mind. As we explain in our introduction, the problems of the office supervisor are sufficiently distinct to warrant separate treatment.

The Committee believes that the proposals they have made will greatly increase the effectiveness of supervision in offices. It therefore invites the Central Training Council to endorse this report and to recommend to industrial training boards that they should take its recommendations into account in considering the form of training of office supervisors which they should recognise for grant.

Yours sincerely,

W. F. HOUGHTON

Chairman

Sir JOHN HUNTER, C.B.E.

Chairman

Central Training Council

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* Members of the Central Training Council.

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